

EXHIBIT SO-07

Donor Contact Services : DCS Policies

This page last changed on Apr 30, 2020 by [clujan](#).

Attendance

During the COVID-19 pandemic, all WVUS employees are required to complete a form to report their sick time to the HR Leave Administrator. Those who normally report sick time to Ops will continue to follow the normal DCS process. Include in your email to Ops if your outage is either related to COVID-19 or not. Ops will then complete the form for you.

Policy Statement

Punctuality and regular attendance are essential functions to insure optimal productivity and an exceptional donor experience. In order for DCS to achieve these goals employees are required to maintain a satisfactory record of attendance. The following is DCS's policy on attendance.

Attendance Policy

All employees are expected to report to work on time every day that they are scheduled to work and to maintain a satisfactory record of attendance. If an employee is unable to report to work they are expected to notify the Operations Desk before the start of their shift at 253-815-5858 or 888-511-6543. When calling and reporting out for work, coming in late for your shift, or leaving before the end of your shift, the reason for the time away from work needs to be provided. The employee is responsible for providing the reason and relationship (if not for self) in order to ensure the time away from work is coded correctly.

All non-exempt employees within DCS are expected to be at their workstation, signed in and prepared to start their scheduled shift on time. An employee who is absent from work without notifying the Operations Desk may be determined to have abandoned their job and thus be separated from employment. (WVUS Operational Policy O-240.60).

A minimum of two (2) business days are required for advance notification of all foreseeable appointments, including scheduled appointments for FMLA, state designated sick time, or other protected medical appointments. Failure to provide such notice may result in corrective action independent of the performance action levels listed below.

Pre-approved time off is exempt from the attendance policy. Pre-approved time off requires a minimum of 2 business days advance notice.

Provisions

- Occurrences (Tardy, Absence and Days) will be counted on a rolling 12-month basis
- Leadership or Human Resources may request documentation of sickness, as appropriate
- Accelerated corrective action is at the discretion of leadership
- Attendance Policy is for all non-exempt DCS employees
- Approved additional hours can be cancelled within 24 hours. Less than 24 hours or not showing up for approved hours will be subject to the attendance policy guidelines
- You may not log on more than 5 minutes prior to your shift

Definitions and Guidelines

Occurrence

- An occurrence is an unscheduled absence or late arrival (tardy) not protected by FMLA or other federal, state, or local protected leave.
- If only a portion of a day is protected by FMLA or other protected leave, an occurrence may be issued for the unprotected portion.
- Occurrences will apply for any unprotected portion of approved leave i.e. STD and WPFMLA.
- Occurrences are counted as outlined below under Tardy, Absence and Days

1. Tardy

- Not ready to serve the donor at the start of your scheduled shift time
- Arriving late up to 1 hour and 59 minutes into your shift
- Returning 1 or more minutes late from scheduled activity, such as: Breaks, Lunch, Devotions, Meetings, etc.
- Each Tardy is counted as 1 tardy occurrence

2. Absence

- Each of the following is counted as 1 absence occurrence:
- Not present for your scheduled shift
- Arriving more than 1 hour and 59 minutes late for scheduled shift
- Logging off the system 1 or more minutes before the end of your scheduled shift
- An absence that occurs because of an illness on consecutive days will be considered as 1 occurrence
- Day of Grace - if you are out sick for a full day, attempt to come to work on your next scheduled day and find it too soon, leaving early will not count as a new absence occurrence
- Any absence 5 or more days in length will require a return to work note from your doctor

3. Days

- Number of days out for an absence occurrence (does not include occurrences that count as tardy or 6any days out that are protected under any Federal, State, or other leave).
- Please note: Even if an absence is counted as a continual occurrence, each day out will count towards Days. For example, if an employee is out on three separate times for unplanned sick for 2 days each (after any protected time off), that would be a total of 3 Absence Occurrences and 6 Days.
- Days will be counted as outlined below:

8-hour Shift		9-hour Shift		10-hour shift		4-hour shift		5-hour shift	
Amount of Time Missed	Days	Amount of Time Missed	Days	Amount of Time Missed	Days	Amount of Time Missed	Days	Amount of Time Missed	Days
Up to 2 hours	0.25	Up to 2.25	0.25	Up to 2.5 hours	0.25	Up to 1 hour	0.25	Up to 1.25 hours	0.25
2 to 4 hours	0.5	2.5 to 4.5 hours	0.5	2.5 to 5 hours	0.5	1 to 2 hours	0.5	1.25 to 2.5 hours	0.5
4 to 6 hours	0.75	4.5 to 6.75 hours	0.75	5 to 7.5 hours	0.75	2 to 3 hours	0.75	2.5 to 3.75 hours	0.75
6 to 8 hours	1	6.75 to 9 hours	1	7.5 to 10 hours	1	3 to 4 hours	1	3.75 to 5 hours	1

Performance Action Guidelines for Tardy, Absence Occurrences and Days

Absence and Days	Occurrences/Days	Performance Action
Absence Occurrence	4 Occurrences	Verbal Warning/Satisfactory
	5 Occurrences	Written Warning/Unsatisfactory

	6 Occurrences	Final Written Warning/ Unsatisfactory
Days	7 Days	Verbal Warning/Satisfactory
	8 Days	Written Warning/Unsatisfactory
	9 Days	Final Written Warning/ Unsatisfactory

Tardy	Occurrences/Days	Performance Action
Tardy Occurrences	5 Occurrences	Verbal Warning/Satisfactory
	6 Occurrences	Written Warning/Unsatisfactory
	7 Occurrences	Final Written Warning/ Unsatisfactory

Medical Related Absences

Any protected leave approved by the Human Resource Leave Administrator is exempt from the attendance policy. Approved but unprotected leave such as STD and WPFMLA will be subject to the terms of the Attendance Policy.

Guidelines for Policy Overrides

We are aware that emergencies may occur. These will be reviewed by the Director or Senior Director on a case-by-case basis.

Exceptions

The DCS Attendance Policy is for incidental absence and tardy tracking. Any absence or leave that falls under any local, state, or federal protection is excluded.

Resources to request time off for DCS:

- Health Care Appointments (Medical, Dental, Vision)
- FMLA Appointments
- Vacation time is requested through Webstation
- Personal Time as approved by manager, up to a maximum of 24 hours can be used for full-time and to 18 hours can be used for part-time employee.

Employee Paid Sick Leave (WSDS)

You are entitled to accrue paid sick leave. The leave will accrue at least one (1) hour of paid sick leave for every 30 hours you work.

You may use accrued paid sick leave beginning 90 calendar days after the start of your employment.

You may use this accrued paid sick leave for the following reasons:

- To care for yourself or a family member (please refer to Sick Leave policy for eligible family members).
- When you or a family member is the victim of sexual assault, domestic violence, or stalking.
- In the event our business or your child's school or place of care is closed by a public official for any health-related reason.

World Vision's accrual year is January 1st to December 31st.

A minimum of 40 hours of unused, accrued paid sick leave will be carried over to the next year. Accrued, unused leave over 40 hours will be forfeited.

Retaliation for using paid sick leave for authorized purposes is prohibited.

If you have any questions, please ask your Manager, HR Business Partners or HR Leave Administrator.

**** These accrued hours are not in addition to the paid sick leave World Vision provides, these are the number of hours protected under WSDS.**

Bldg 2 Cafeteria

Important things to know about using the patio

- The back door from the lunchroom to the patio will be available to exit and re-enter bldg 2 from Monday - Saturday, 8am - 5pm. There is a card reader that WV staff will swipe their access cards to come back in from the patio (where to swipe your access card is clearly marked). Make sure only WV staff come back in with you for security purposes.
Important to note - if you attempt to exit thru the patio door before or after the hours above, the alarm will sound.
- The card reader will not allow you to re-enter outside of the hours indicated above.
- In the event of an emergency, the patio door can be used to exit the building if you are in the lunchroom when the emergency occurs.
- Because the public access trail is adjacent to the new patio, we will not be able to have the white outdoor chairs on the bldg 2 patio as we are concerned that people passing by after hours might come up onto the patio and be tempted to permanently borrow those chairs. Staff should feel free to bring their camp or beach chairs to sit in but they cannot be left or stored outside as we cannot take responsibility for these items.
- The interior lunchroom tables and/or chairs CANNOT be taken out onto the patio as the concrete will damage the casters and scratch the lunchroom floor.
- From the new patio door to the far southern end of the building, the exterior windows all along the 1st floor are part of Texas Instruments' leased space. Therefore, please be considerate of our tenants by not actively looking into their windows/offices, or congregating at the exterior door.
- As the weather changes, please expect adjustment of the days/times the patio door will be available for use.

Desk and Computer Management

Access and use of these systems is a privilege, not a right, and they shall be used in an efficient, ethical, and professional manner, consistent with state and federal law and World Vision policies and guidelines.

World Vision reserves the right to monitor Internet communications and/or usage at its discretion. WV considers internet Email to be like any other business document and is the property of the company. User files may be subject to search under court order if such files are suspected of containing information that could be used as evidence in a court of law.

Appropriate use reflects professional honesty and ethical behavior and demonstrates consideration in the use of various computing resources such as networks and file servers. It shows respect for intellectual property, ownership of data, system security mechanisms, the rights of others to privacy and to freedom from intimidation, harassment, and unwanted annoyance.

In no case should any confidential material be disseminated using the WVUS Network without appropriate authorization. "Confidential material includes but is not limited to donor, operational, or financial information, and all other World Vision material not approved for public release."

- DCS employees are to use Internet for World Vision business ONLY.
- DCS employees are to avoid inappropriate sites and users may not download, print, store, or distribute information that is considered personal in nature.
- DCS employees are not to misuse the company resources to "hack" or cause damage to other networks, including the company's system.
- DCS employees are to avoid using sites that contain material that is inappropriate and is not work related. Inappropriate material includes, but is not limited to, that which is generally considered offensive, obscene, or sexually explicit, games, "chat" sessions, and some discussion or news groups.
- Calls with screen capture may be recorded/monitored for quality and training purposes.
- Designated computers in the break room may be used during lunch and breaks.

Note: Accelerated corrective action is at the discretion of leadership.

- **First occurrence** = verbal warning
- **Second occurrence** = written warning
- **Third occurrence** = grounds for disciplinary action up to and including the possibility of termination.

DCS Mission Statement

*"Consumed and called by Jesus Christ,
we passionately act in urgency, excellence, integrity, and humility.
We joyfully provide unprecedented service with our partners
on behalf of those in need around the world."*

We are all working together to achieve the Mission of World Vision and DCS. This Handbook outlines the policies and guidelines to give all members of DCS the ability to provide world-class services to each of our donors and potential donors.

Being a part of DCS means you are the **Voice, Face** and **Heart** of World Vision. This challenge requires that each of us think of ourselves as servants; demonstrating flexibility, and servicing the donor(s) with a smile. Without these values our donors cannot receive the quality of service DCS prides itself on providing. This also means we have to be here when donors need us. Sometimes that may mean working late in the evening, sometimes on the Holidays when pre-scheduled or authorized. Regardless of when the donors call, DCS is committed to being here.

Let us remember Paul's message in Romans 12:5-7 "... so we though many, are one body in Christ... Having gifts that differ according to the grace given to us, let us use them... if service, in our serving;"

Let us always strive for excellence in all we do in the name of Christ Jesus!

We believe in mutual respect between all people.

We are responsible for accountability, ultimately to the Lord.

We believe in high expectations and a high level of performance.

*We believe in working together to achieve a common goal: **Working collaboratively to serve the poor in Jesus' name.***

We believe in open lines of communication, urgency, excellence, integrity, and humility.

We will be kind and compassionate to one another, forgiving each other, just as in Christ, God forgave us.

Donor Mistreat

DCS and World Vision are committed to servicing our donor's needs and providing quality service at all times. Conduct that does not support this commitment is unacceptable and will result in accelerated corrective action, up to and including termination. All instances will be investigated and are subject to management discretion.

Unprofessional conduct includes, but not is limited to the following:

- Misuse of donor information (personal or professional use)
- Disconnecting a call without providing quality service to the donor for both inbound and outbound calls. There will be zero tolerance for hanging up on a donor (or potential donor).
- Not following through with a donor's request
- Inappropriate words, tone, or actions when servicing a donor. This includes using offensive language, arguing, and being rude, abusive, or demeaning to the donor.
- Mis-terminating a call. Rescheduling 'no's' or choosing 'yes' when a donor said 'no' or 'maybe.'
- Giving inaccurate information to a donor. (Giving your opinions or not researching to find the correct information).
- A donor writes or calls regarding poor service.
- Any other unprofessional service or behavior.

Dress Code

It is the responsibility of each manager/leader to ensure that the style of dress of his or her employees is acceptable. All employees are expected to dress professionally and appropriately for the work of their department.

- World Vision employees are to dress with good taste, modesty and safety.

- Employees' dress, like our manner and personal conduct, must consistently be reflective of Christ in us as a witness.
- As a leader in the Christian community, World Vision desires to be looked upon as an example of excellence in our field.
- Public tours of the facilities are an aspect of public relations. What we do and wear affects attitudes of the community and our constituency.

For examples of acceptable and unacceptable clothing and other details, please visit the World Vision Dress Code Policy [here](#).

Use of Scents and Fragrances

Your station neighbor and others you work with may have allergies to scents and fragrances, so please refrain from wearing such products during your shift. Products to avoid include perfume/cologne, scented lotions/oils, and heavily scented soaps (i.e., body wash, laundry products, etc).

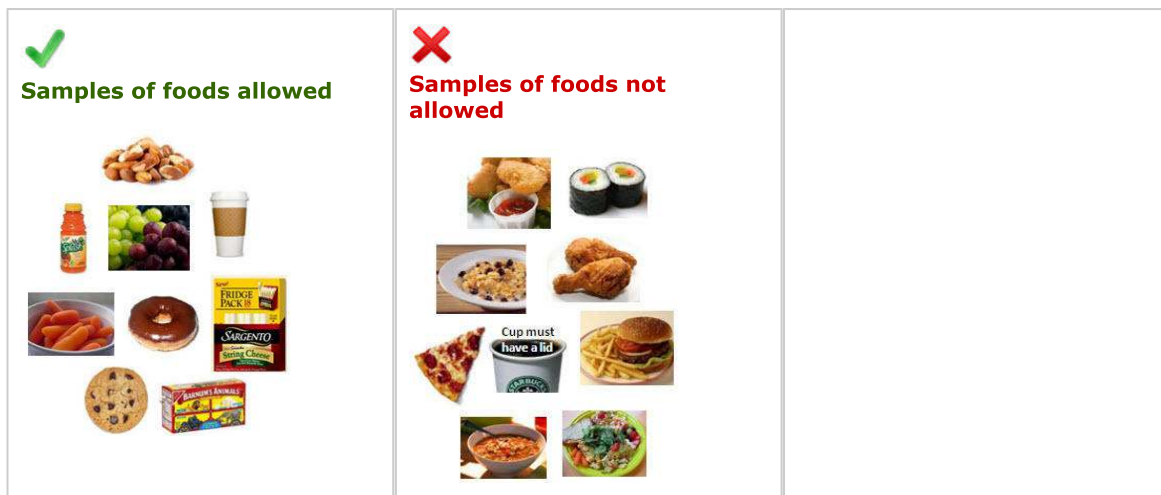
Corrective Action

Accelerated corrective actions are at the discretion of the leadership

- **First occurrence:** Verbal warning
- **Second occurrence:** Written warning
- **Third occurrence:** Grounds for disciplinary action up to and including the possibility of termination (For more information please see: [WVUS Operational Policy 0-270.10](#))

Eating at Your Desk

In order to keep our keyboards functional and our desks clean, here are examples of the types of foods that are okay to eat and drink at your desk. Small snacks are okay, but meals are not. Eating is never okay, of course, when you're talking with a donor.



Employee Conduct

To assure orderly operations and provide the best possible work environment, World Vision expects employees to follow standards of conduct that will protect the interests and safety of all employees and World Vision. World Vision expects a high standard of conduct in the behavior of its employees. Appropriate conduct, whether on duty or off, is expected at all times while on World Vision property. Compliance with common sense rules of conduct is the responsibility of all employees.

It is not possible to list all the forms of behavior that are considered unacceptable in the workplace. The following is a partial list of the specific kinds of conduct that may result in disciplinary action, up to and including termination of employment.

- Theft or inappropriate removal or possession of property belonging to World Vision, a co-worker, or a vendor
- Falsification of timekeeping records
- Being on World Vision property under the influence of alcohol or illegal drugs
- Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace, while on duty, or while operating employer-owned vehicles or equipment
- Fighting or threatening violence in the workplace
- Boisterous or disruptive activity in the workplace
- Negligence or improper conduct leading to damage of employer-owned or customer-owned property
- Insubordination or other disrespectful conduct
- Violation of safety or health rules
- Smoking in prohibited areas
- Sexual or other unlawful harassment
- Possession of dangerous or unauthorized materials such as explosives or firearms, in the workplace
- Excessive absenteeism or any absence without notice
- Unauthorized absence from workstation during the workday
- Unauthorized use of telephones, mail system, or other employer-owned equipment
- Unauthorized disclosure of confidential information
- Violation of personnel policies
- Unsatisfactory performance or conduct

These standards are provided for your information. World Vision reserves the right to determine, at its sole discretion, whether an employee has committed one of the offenses identified in this list or any other offense that warrants discipline, and to determine the degree of discipline that may be appropriate. Employment with World Vision is at the mutual consent of World Vision and the employee, and either party may terminate that relationship at any time, with or without cause and with or without advance notice.

Entry to DCS, Bldg 2, thru Security Gate

DCS and Bldg 2

Please always have your badge available when entering Building 2 and the call center.

If you've forgotten your badge, please ring the doorbell (near the restrooms) on the second floor to get buzzed in. You will need to sign out a temporary badge through Ops.

For added security, those without badges wanting entry into Bldg 2 through locked doors or any of the DCS offices must check in at the Security Desk in Building 1.

Security Gate

- The gates will be open from 6am to 6pm Monday thru Friday. They will be locked outside of these hours, including all day on Saturday.
- To enter the parking lot during locked hours, please use the main gate at building 1. You will need to swipe your key card at the card reader.
- **To leave the premises when the gates are locked**, you must exit through the main gate at building 1. It's the only gate that is equipped with a weight sensor that will trigger it to open when you want to leave.

DCS is open on Saturdays during holiday season. If you forget your key card on Saturday, know that Security is on site at 6am but may not be in the kiosk area inside building 1 to buzz you in until a little after 6am. Please park at building 3 and walk over to building 2. Follow normal procedures to get into the building when you don't have your key card.

Flex Time

1. The minimum amount of flex time that can be requested will be 30 minutes.
2. Flex time will be limited to 1 request per calendar month regardless of whether the request is for 30 minutes or 4 hours. Exceptions need to go through your supervisor.
3. Vacation time needs to be used first unless we are in busy season and are expecting high volumes/workloads.

Handling Donors' Credit Card Information

World Vision takes donors' financial privacy very seriously and developed a policy on how to protect that privacy. Because DCS is in continual contact with donors' bank information, we are responsible for adhering to the policy evermore so:

DCS staff should never:

1. Write down a donor's credit card number
2. Type a donor's credit card number in Word, Notepad, or any other software application, even if the intention is not to save the information but preserve it during a system issue (e.g., imminent DV crash)
3. Email a donor's credit number internally or externally (exception: if referencing a donor's existing credit card, you may email the last 4 digits to DP when necessary)
4. Enter the complete number in an account note or task (exception: if referencing a donor's existing credit card, you may enter the last 4 digits in the account note/task)

For your reference, an excerpt of the World Vision policy is available below. To read the complete policy, click [here](#). All World Vision staff must adhere to the complete policy to be in compliance.

STATEMENT OF POLICY:

World Vision requires that all employees who handle donor funds and personal donor data, read, understand and follow this policy. This policy was established to provide protection to both World Vision employees and donors.

The organizational policy is for funds (cash, checks, money orders, EFT, and/or credit card information) delivered directly from the donor to the Donation Processing Department in Federal Way. This also includes funds collected through third party relationships.

CAUTIONS

- NEVER RETAIN photocopies or hand-written copies of donor credit card or banking information. The risk of fraudulent activity can occur just as easily from the routing number across the bottom of a donor's check as it could with their credit card number.
- NEVER USE interoffice mail to route donor funds or personal financial information. Donor funds must be hand-delivered to Donation Processing immediately upon receipt---Monday-Friday, 8:00 a.m.-4:00 p.m. PST. Funds received after normal WV business hours or from a location other than the Federal Way campus; must be locked up and secured to limit access to donor funds and personal information. [See Procedure #130.22 for further details concerning access to Donation Processing and logging in donor funds.]
- NEVER SEND donor funds or personal financial information to any other person or mail stop in the Federal Way office or elsewhere.
- NEVER SEND donor credit card or banking information via email or FAX.
- NEVER include the words "Donation Processing" on any return envelopes.
- NEVER forward donor funds through WV inter-office mail envelopes.

REMITTING DONOR FUNDS

- Fund-raising campaigns and response device language should always request that donations be remitted directly to World Vision's Federal Way Incoming Mail Center, M/S 110.
- Development, church and other representatives should ask donors to send checks directly to World Vision and supply a standard WV donor response envelope with appropriate World Vision address.
- Partner events (i.e.; Artist Associates, 30 Hour Famine, Women of Vision, etc), should include training and instructions for the responsible World Vision employee or volunteer.

Internet Usage

Be advised that all Internet use will be logged by the Systems Administration Group. This means that every site visited and every file downloaded by you will be a matter of record. Managers may request reports of usage where abuse is suspected. Logs may be reviewed for sites and downloaded files that are deemed inconsistent with [WVUS Internet Use Policy and Guidelines](#).

Suspected inappropriate use will be reported.

Personal Calls

DCS is an inbound / outbound contact center. Therefore, our responsibility is to respond to our customers in a timely manner and be good stewards of the resources that have been entrusted to us. Following are guidelines to adhere to:

- DCS World Vision Telephones are to be used ONLY to carry out World Vision Business.
- No personal calls should be made or received at your workstation. Please use the telephones installed in the break room or in the phone booth located by the south stairwell exit.
- Only give out the 253-815-5858 for emergency messages from school or day care, family or friends and/or medical offices. Please advise the department management of any emergency personal calls or need to check on a pressing situation (i.e. sick child, medical test results, etc).
- Personal long distance calls are NOT permitted. Exception can be made in case of an emergency, please see department management for assistance.
- No cellphones in use on the floor AT ANY TIME.
- Do not invite, encourage or suggest that people call you on the World Vision published 800/888 numbers for personal reasons.
- All calls are recorded/monitored.
- **In case of emergency**, your family members can contact you through the Operations Desk at 253-815-5858.
 - IMPORTANT NOTE: The Operations Desk Emergency Line should not be used for personal calls. The Operations Emergency Line should not be given for personal calls unless the call is an emergency or in which you need immediate notification such as a doctor's call, daycare or family emergencies. Callers are notified that the line is for Emergencies only and to try to reach employees at home.

The following steps may be taken if it is observed that a representative is making or receiving personal telephone calls while on duty:

- **First occurrence** = verbal warning
- **Second occurrence** = written warning
- **Third occurrence** = grounds for disciplinary action up to and including the possibility of termination

Accelerated corrective action is at the discretion of leadership.

Work At Home (WAH)

Guidelines and Procedures

[Program Overview](#)
[Self-Assessment Survey](#)
[Supervisor Review](#)
[Onsite Assessment](#)
[Final Agreement](#)

Your World Vision Account

The personal Donor Vision accounts of DCS staff members should be created and updated through the same means as any other donor accounts. Please do not handle transactions on your own account or ask a DCS peer to do it for you.

If you wish to create a personal account or update your existing account you may call the DCS toll-free number to do so or you may go online to create an account or handle any applicable online updates.

See also [WVUS Policy Hub - additional policies](#)
